

Executive Branch Personnel Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

JONES, PENELOPE

Special Advisor, Office of Science, Department of Energy

Date of Appointment:

Other Federal Government Positions Held During the Preceding 12 Months:

None

Electronic Signature - I certify that the statements I have made in this form are true, complete and correct to the best of my knowledge.

/s/ JONES, PENELOPE [electronically signed on 09/09/2017 by JONES, PENELOPE in Integrity.gov]

Agency Ethics Official's Opinion - On the basis of information contained in this report, I conclude that the filer is in compliance with applicable laws and regulations (subject to any comments below).

/s/ Stewart, Yvonne R, Certifying Official [electronically signed on 10/19/2017 by Stewart, Yvonne R in Integrity.gov]

Other review conducted by

/s/ Stewart, Yvonne R, Ethics Official [electronically signed on 10/19/2017 by Stewart, Yvonne R in Integrity.gov]

U.S. Office of Government Ethics Certification

Data Revised 10/19/2017

Data Revised 09/15/2017

Data Revised 09/12/2017

Comments of Reviewing Officials (public annotations):

PART	#	REFERENCE	COMMENT
N/A	N/A	General	{09/15/2017, Stewart, Yvonne R}: 502: University of Texas at Dallas

1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	University of Texas at Dallas	Richardson, Texas	University/College	Research Assistant	11/2012	Present

2. Filer's Employment Assets & Income and Retirement Accounts

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	University of Texas at Dallas, anticipated bonus	N/A	\$1,001 - \$15,000		None (or less than \$201)
2	University of Texas at Dallas	N/A		Salary	\$65,785
3	Teacher Retirement System of Texas (TRS) defined benefit plan (value not readily ascertainable)	N/A			None (or less than \$201)

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	University of Texas at Dallas	Richardson, Texas	Bonus expected to be received 10/01/2017 for work performed outside of my typically assigned duties. This work included build-out of new lab space and coordination of lab move.	1/2017
2	University of Texas at Dallas	Richardson, Texas	I will discontinue my participation in this defined benefit plan. The plan sponsor will not make further contributions after my separation.	11/2012

4. Filer's Sources of Compensation Exceeding \$5,000 in a Year

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
1	University of Texas at Dallas	Richardson, Texas	Clinical Research and Academic Lab Manager, Clinical Research Study Coordinator, multi-site project manager, data acquisition, validation and analysis, neuroscience researcher

5. Spouse's Employment Assets & Income and Retirement Accounts

None

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Residential rental property, Mankato, MN	No	\$100,001 - \$250,000	Rent or Royalties	\$15,001 - \$50,000

7. Transactions

(N/A) - Not required for this type of report

8. Liabilities

#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	TCF Bank	Mortgage (investment/rental property)	\$100,001 - \$250,000	2007	7.5%	40 years
2	USAA	Credit Card	\$10,001 - \$15,000	2016	prime + 7.65%	revolving
3	USAA	Credit Card	\$10,001 - \$15,000	2016	prime + 11.65%	revolving
4	Fedloan Servicing (US Dept of EDU, Direct Sub Consolidation Loan)	Student Loan	\$15,001 - \$50,000	2016	6.5%	144 months
5	Fedloan Servicing (US Dept of EDU, Direct Unsub Consolidation Loan)	Student Loan	\$15,001 - \$50,000	2016	6.5%	143 months
6	Fedloan Servicing (US Dept of EDU, Direct Unsub Stafford Loan)	Student Loan	\$15,001 - \$50,000	2012	6.8%	168 months

9. Gifts and Travel Reimbursements

(N/A) - Not required for this type of report

Endnotes